# 2 - Data File Export from eHEAT



# United States Department of Energy

Weatherization Assistance Program

Weatherization Assistant

Version 8.2.1.0 10/11/2004



#### National Energy Audit Tool (NEAT)

Developed by Oak Ridge National Laborator,



#### Manufactured Home Energy Audit (MHEA)

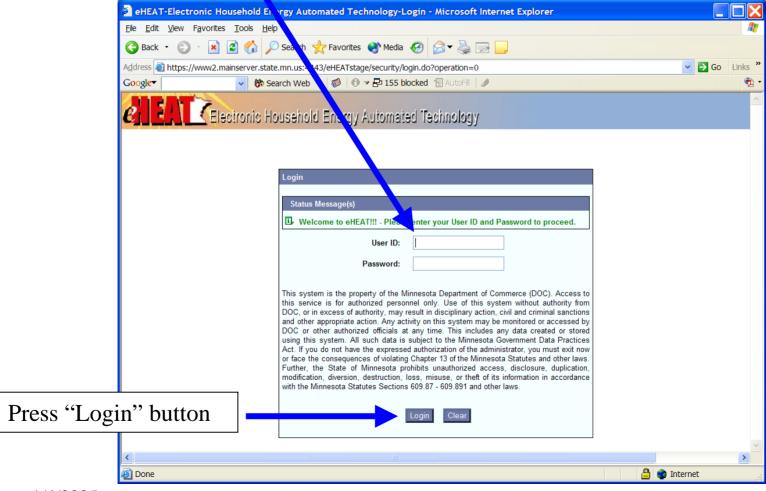
Developed by the National Renewable Energy Laboratory





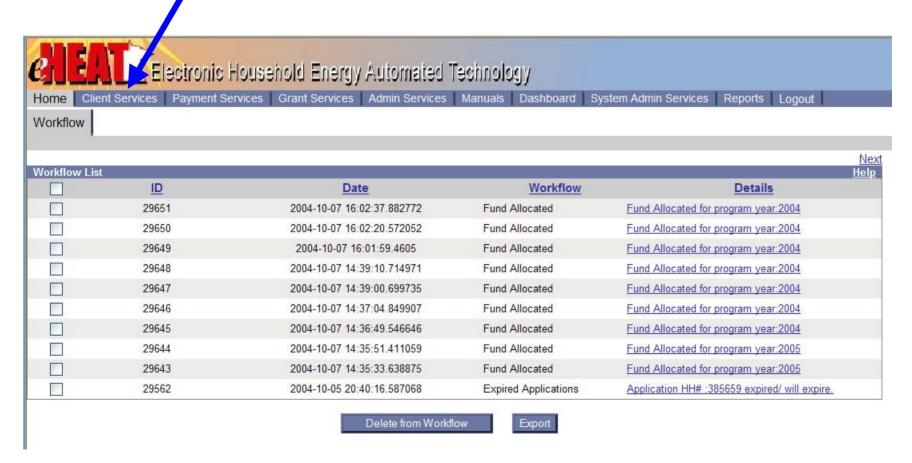
Initial login screen for eHEAT

Enter User ID and Password assigned to your Agency personnel



After logging in, the user will see a screen similar to this showing various items in the Workflow list. Our interest is in the Client Services area.

Select the "Client Services" tab

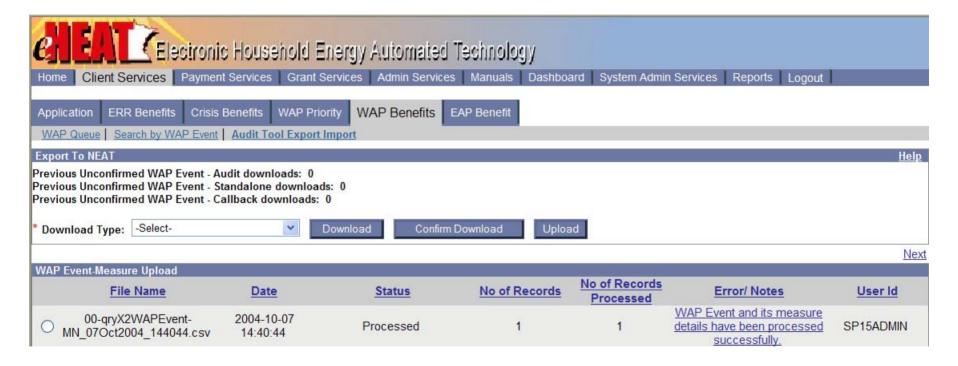


From the WAP Benefits screen we want to select "Audit Tool Export Import" to generate and export data files containing information which will be imported by the NEAT weatherization audit tool.

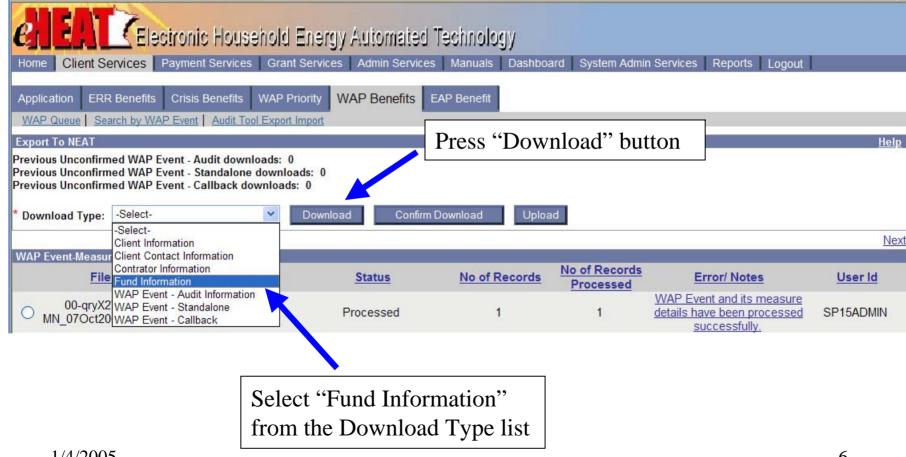
Select the "Audit Tool Export Import" link.



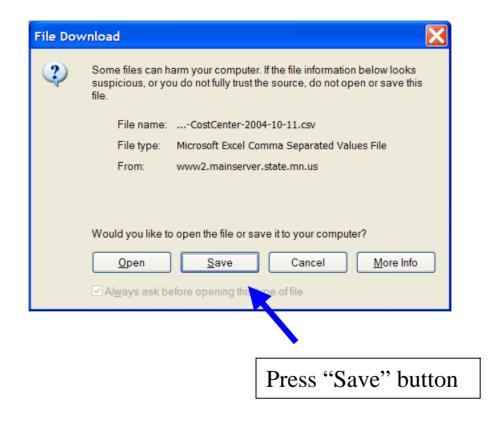
At the Export To Neat screen there are options to <u>Download</u> information for households that have WAP Events already created, <u>Confirm Download</u> after importing the data into NEAT, and <u>Upload</u> information to eHEAT after an audit and weatherization are completed.



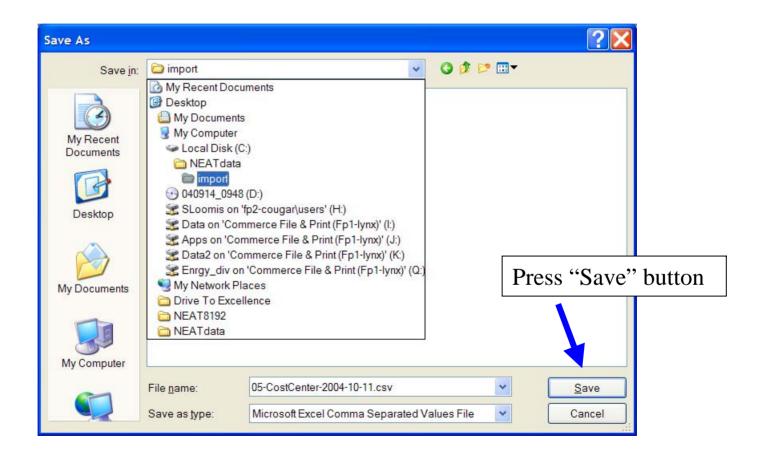
There is an initial download of Fund Information from eHEAT (Fund Categories in eHEAT or Cost Centers in NEAT). There may be subsequent Fund Information downloads.



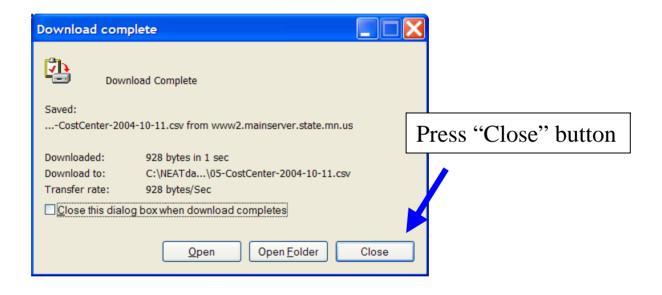
A screen will be shown indicating that you need to Save the Fund Information file. Pressing the "Save" button will open up a screen asking where you want to save the file.



Select the location for storing data files on a local machine or network drive at the Service Provider office. Here the location to save the eHEAT files is in a folder on a local machine having the path <u>C:\NEATdata\import</u>.



A message will be shown indicating that the file download is complete.

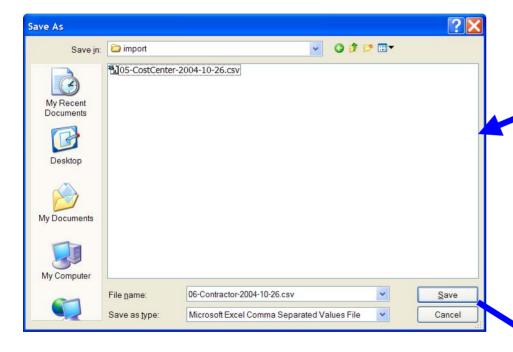


There is an initial download of Contractor Information.

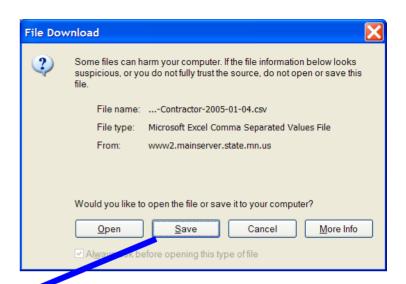
There may also be subsequent Contractor Information downloads.

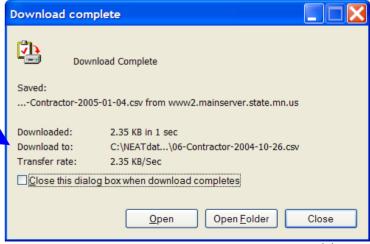


The Contractor Information file will be saved to the local machine or network drive, as with the Cost Center or Fund files.

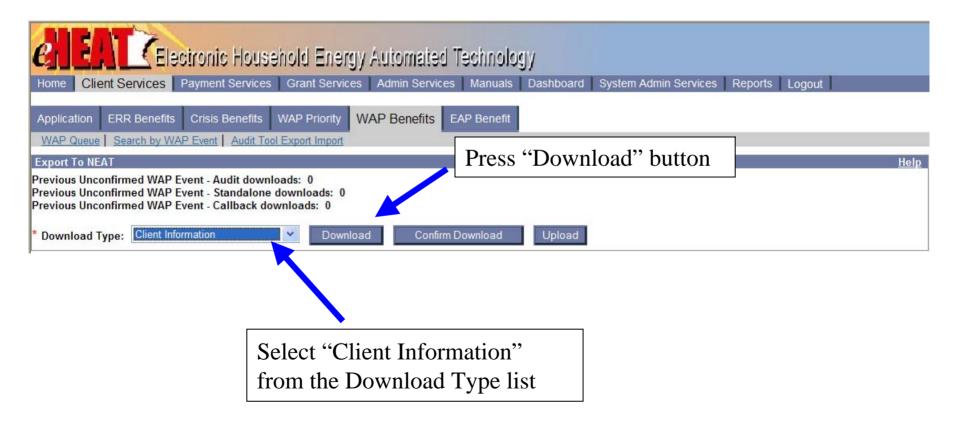


(File names are slightly different on this screen due to adding this slide from a different example download.)

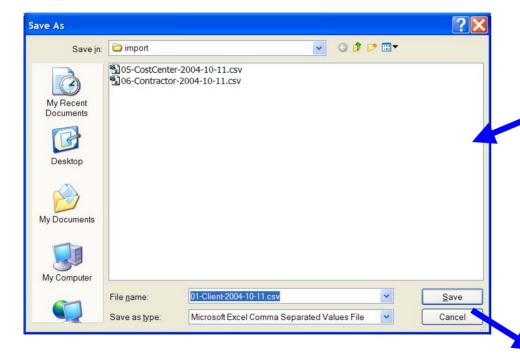


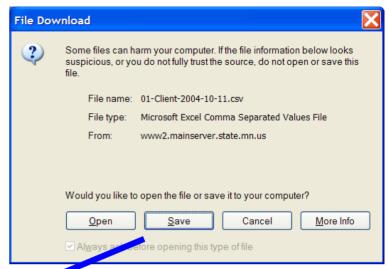


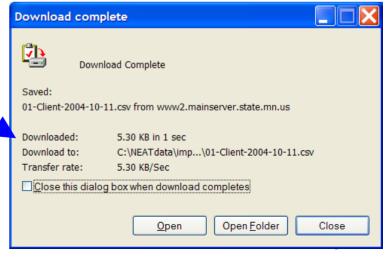
There must be a download of Client Information before Client Contact and Audit information can be downloaded. There will be additional Client, Client Contact and Audit downloads when new WAP Events are created. Multiple clients, client contacts, and audits can be exported in one Download process.



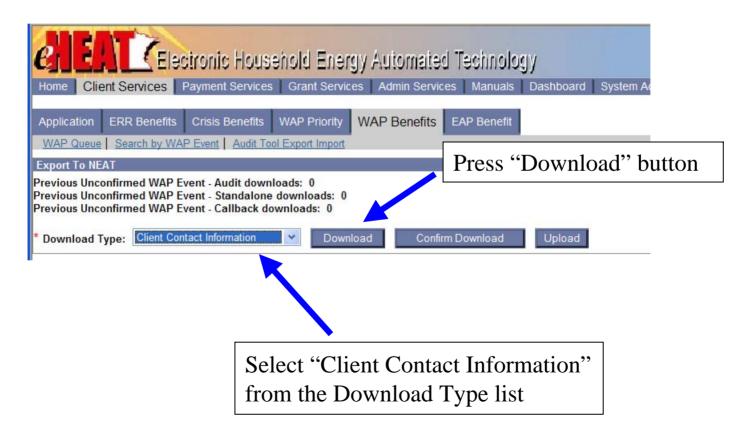
The Client Information file will be saved to the local machine or network drive, as with the Cost Center and Contractor Information files.



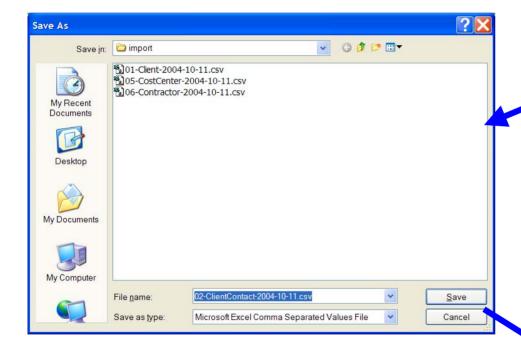


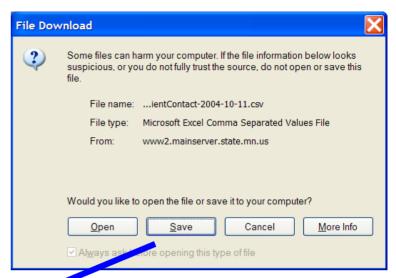


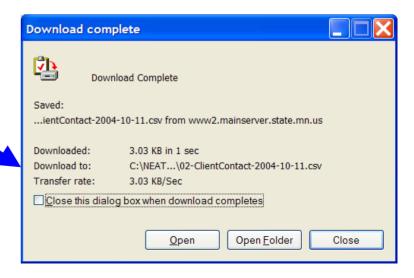
After downloading the Client Information file, the Client Contact Information file needs to be downloaded.



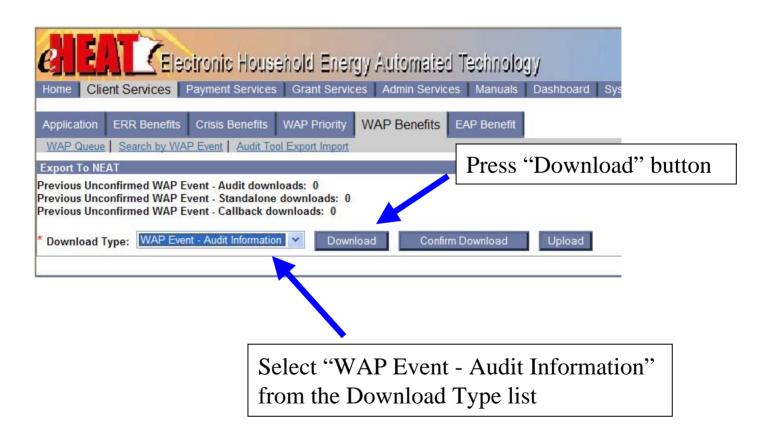
The Client Contact Information file will be saved to the local machine or network drive.



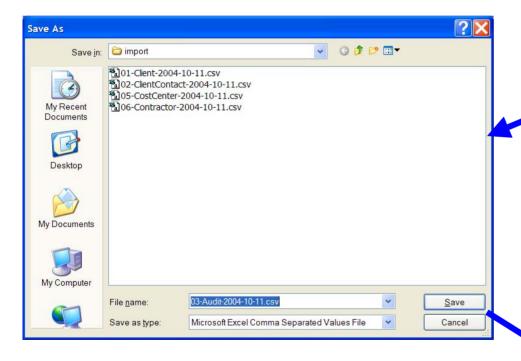


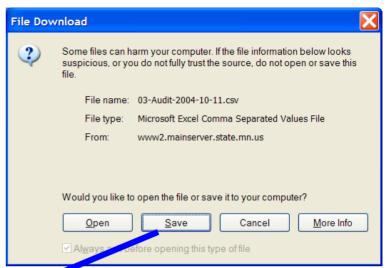


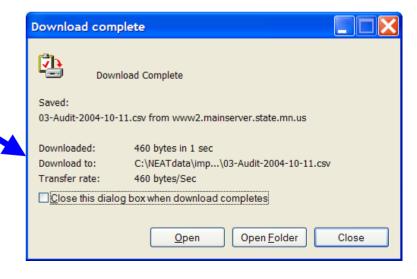
After downloading the Client Information file, the Audit Information file needs to be downloaded.



The WAP Event - Audit Information file will be saved to the local machine or network drive.





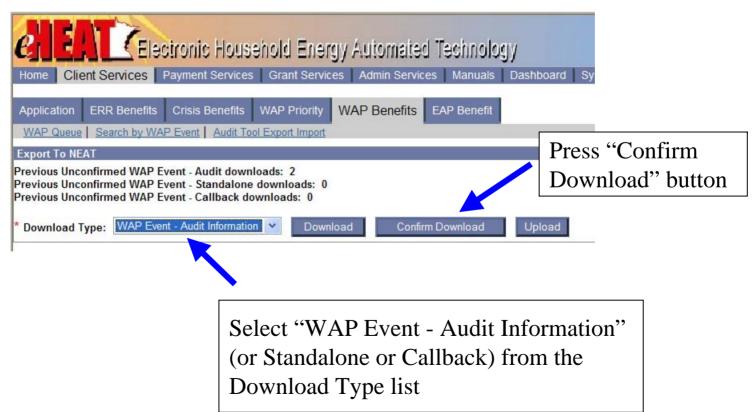


Need to Download a WAP Event - Standalone or WAP Event - Callback information file if any stand-alone or callback WAP Events were created. In this example for a stand-alone, none were created so an error message indicates that no records were available to be downloaded.



This step must be performed after the downloaded eHEAT files are successfully imported into NEAT.

Need to Confirm Download of WAP Events (Audit, Standalone, and Callback) after successfully importing the files into NEAT. This changes the status of the WAP Events in eHEAT from "Downloaded" to "Work in Progress".



After successfully confirming the download, a status message is shown. The Previous Unconfirmed WAP Event - Audit downloads count is changed to zero.

